Southern Alberta Landscapes

MEETING THE CHALLENGES AHEAD ▶▶

Forty Possible Methods for the Southern Alberta Landscapes Project

Prepared for
Alberta Environment
by
Foresight Canada
2007

Alberta

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ISBN: 978-0-7785-6317-4 (Print version)
ISBN: 978-0-7785-6318-1 (Online version)
Website: www.gov.ab.ca/env

Disclaimer: The contents of this document have been prepared with funds from Alberta Environment but do not necessarily reflect the Ministry's views or policies. Any mention of trade names or commercial products does not constitute an endorsement or recommendation for use.

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Foresight Canada

The Research Arm of the Creating Tomorrow Foundation

Working Paper #6

Forty Possible Methods

For the Southern Alberta Landscapes Project

Prepared for the
Total SAL Team
Southern Alberta Landscapes Project
Alberta Environment

Prepared by
Foresight Canada

February 20th, 2007

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*This is one in a series of working papers prepared by Foresight Canada for the *Southern Alberta Landscapes: Meeting the Challenges Ahead* project.

INTRODUCTION

About This Working Paper

This working paper sets out forty of the methods processes that can be utilized when designing the overall Southern Alberta Landscapes (SAL) Strategy Development Project. We do not anticipate that all of these methods will be used. Rather, the actual methods to be utilized during the SAL Strategy Development Project will be identified as the project is designed. The intention at this point is to provide enough information about each method to allow all members of the Total Southern Alberta Landscapes Team (TSALT) and others to be able to think creatively about which methods might best be used and when, in order to achieve the results we desire.

The Five Elements of the SAL Strategy[1]

During the *Methods* phase of the preparatory work – October 2006 to January 2007 – the Total SAL Team (TSALT) agreed that a well-formed strategy for the southern Alberta landscapes would include findings and outcomes in each of the following five major elements and that, taken together, these elements will make up the SAL Strategy:

1. **Our Situation:** Critical elements of the past, present and future influence of humans on the southern Alberta landscapes, including how and why they have changed, are changing and could change, *the forces driving landscape change, the key uncertainties affecting the future of southern Alberta*[2], and the range of possible futures, for good or ill, inherent in the present.

2. **Our Vision:** An inspiring *50 year vision* of the best that the southern Alberta landscapes can be in the mid 21st Century, in light of our present situation in history. This element of the SAL Strategy will include clear statements of the *regional resources and environmental outcomes – integrated statements of the desired, achievable, strategic and long-term (50 year) end-state goals shared by the general population for the diverse landscapes of southern Alberta.*

3. **Our Strategic Intentions:** The strategic intentions and the high-level leadership principles we in southern Alberta must form and live by, if our vision is to be realized.

4. **Our Strategic Goals:** The major multi-year goals to which we will commit, the achievement of which will reinforce our intentions and contribute to the vision being realized. This element of the SAL Strategy will include specification of *the key resource and environmental assets to be protected and the issues and opportunities that could threaten these assets.*

5. **Our Management Strategies:** The management approaches – principles, policies, processes and governing structures – that we in southern Alberta will utilize consistently at a regional and sub-regional scale in order to *implement the outcomes*, achieve the goals, form our intentions, realize our vision and address *key issues and opportunities*.

These five elements can be conceived as a set of concentric circles, each successive element being held within the context of the previous element. In a well-formed strategy there will be a clear line of sight from the management level of action, to and through Our Strategic Goals, to and through Our Strategic Intentions, to and through Our Vision, to Out Situation. The reverse will also be true. See Figure 1.

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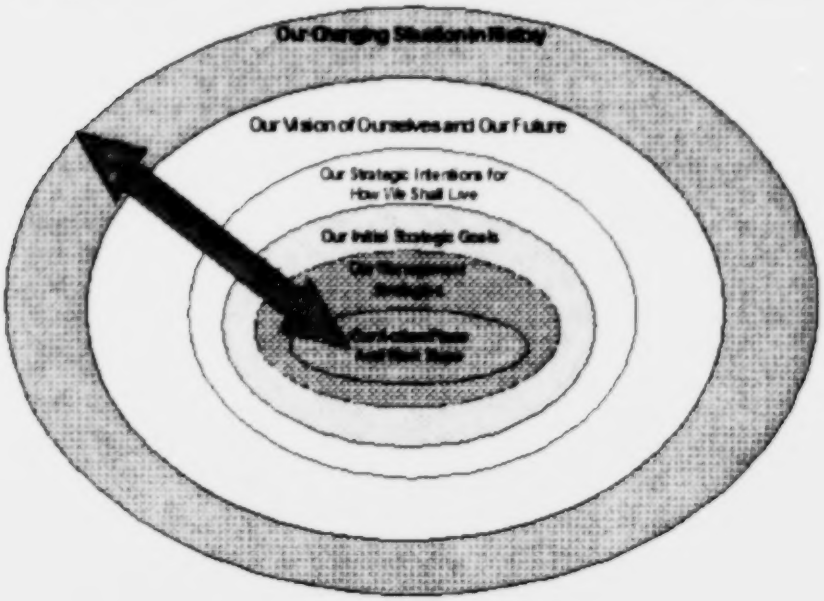
1 In order to allow this Appendix to be used as a stand-alone document, this section repeats information found in the *From Design to Methods* Document. (February 19, 2007)

2 Words in *italics* are taken from the contract between Alberta Environment and Foresight Canada. (October 1, 2006)

Aligning Our Seeing, Thinking & Acting



A Model of the Elements of a Well-Formed Strategy
Figure 1

Methods

We note that no method is a *silver bullet*; all must be combined creatively with others to make the SAL Strategy Development Project succeed. Information about each method is laid out for each of the following areas:

- Name of the method
- Short description
- Results/why use it
- Number of participants the method can handle
- Degree of difficulty
- More information

The methods are grouped according to which of the five elements they would best contribute to. Within each element the methods are listed alphabetically. Clearly some methods can be utilized in the work of more than one element. We have assigned all methods to an element where its use is logical.

Each method is assigned a number for ease of consistent reference. No indication of priority is intended by the number.

METHODS FOR DESIGNING THE OVERALL PROJECT

1. Critical Systems Heuristics

Description: The focus of this method is on the underlying value assumptions in decision-making and planning agendas. It incorporates attention to the use of power and to the nature of coercive situations and it often reveals 'true' interests and motivations underlying situations, solutions, plans by focusing on pragmatic 'intentionality'. The method also sweeps in the moral and ethical dimensions of systems.

The process requires a series of meetings that concentrate on who will be involved and who not in a decision, a process, etc. It is often utilized up front to determine primary and secondary 'players' and is also of use to decision-makers. The process utilizes a set of 'boundary' questions to challenge decision-makers to justify their decisions for inclusion or exclusion from an activity or project.

Results: Decisions regarding inclusion and exclusion that are open, considered and justifiable.

Participants: Those who are making decisions about what groups or individuals are going to participate in an activity or project. Because these individuals hold a degree of power, they are invited to look at how they use this power and the basis or justification for their power when it comes to decisions about inclusion and exclusion.

Difficulty: Medium. The process is straightforward with two sets of questions to define the initial boundary conditions. However, a skilled facilitator is required to ensure that the questions reveal what they are intended to reveal and to manage the ensuing discussion.

More Information:

Flood, Robert L. and Romm, Norma R.A. (Ed.). *Critical Systems Thinking: Current Research and Practice*. (1997) Plenum Press: New York.

Flood, Robert L. and Jackson, Michael C. *Creative Problem Solving: Total Systems Intervention*. (1991) John Wiley & Sons: England.

2. Project Review and Advisory Groups

Description: A Project Review and Advisory Group (PRAG) is a group of persons who commit to reviewing and providing advice on a project from time to time. A PRAG may be selected by several criteria – wise and experienced persons, representatives of stakeholder groups or friends of the project. The rules of engagement must be clear – how often they will be consulted, what kinds of material they will see and not see, who will do what with their advice, whether or not there will be remuneration.

Results: When it works well, a PRAG will catch critical errors before they are fatal and reinforce important strengths that may be overlooked or downplayed. They can also be the source of sound strategic advice.

Participants: A PRAG can be as small as 8 and as large as 40.

Degree of Difficulty: Moderate. Clarity and good facilitation are required.

More Information: Several Foresight Canada members have personal experience with PRAGs.

METHODS FOR SAL STRATEGY ELEMENT I – OUR SITUATION

3. Access to Information and Resources by a SAL Website

Description: In the 21st Century all major projects must be web-enabled. The website must have the capacity to enable access to several levels of information about the project, allow feedback, support interactive dialogue and track progress of the project.

Results: Increased participation in the project, especially by younger persons – teenagers and young adults. Increased confidence in the project. Cost-effectiveness, given that the costs of printing material for everyone who is interested are prohibitive.

Participants: There is no upper limit.

Degree of Difficulty: Moderate to hard. Conceiving an effective website is hard work.

More Information: Your webmaster.

4. Community and World Cafes

Description: Community and World Cafes are recently-developed formal techniques for allowing a relatively large group of people to interact in ways that are both personal and effective. Participants are encouraged to speak a deeper and more authentic voice than that usually spoken at large meetings. The process is usually experienced as supportive, rather than coercive.

Results: The deeper concerns, desires and aspirations of a group can be surfaced. The consensus views of a group can be formed. Personal learning is virtually guaranteed.

Participants: From 8 to 200 persons.

Degree of Difficulty: Easy for the participants. Moderate to hard for the facilitator.

More Information: http://www.conversationcafe.org and http://www.worldcafelive.com

5. Community Evenings or Weekends

Description: A gathering of citizens in a given place, for 3 to 10 hours, that enables interested persons to learn about and contribute to a particular project. Such gatherings must be carefully conceived, designed, organized and facilitated. The focus can vary, depending on what is needed. The meetings may be one-offs or held as a series.

Results: A public indication of who has more than a passing interest in the work at hand. If done well, such meetings can contribute to the success of a larger project.

Participants: Normally, twenty to several hundred.

Degree of Difficulty: Moderate to Hard. The skill is in the conception, design and facilitation of such events.

More Information: Any person with extensive experience with such meetings.

6. Community Reference System

Brief Description: A Community Reference System is a way of identifying those in a community who meet a given criteria, e.g. wisest or most knowledgeable, in order to involve them in a process or event. The steps are: (1) Draw up a social network map of the system, be it a community, organization, town, or region. (2) Develop relevant criteria against which individuals are to be selected. (3) Approach people from different sectors of the system who meet the criteria and poll them for additional names. (4) Select individuals whose names are cross-referenced by their peers in the community. (5) Create a final list that meets the original requirements of representation, balance and diversity.

Results/Why Use It: This process is a referral process for identifying and selecting participants that result in a genuine microcosm of the larger community or region. It meets the requirements of fairness and openness.

Number of Participants Required: Planning Team – 3 to 5 people.

Degree of Difficulty: Easy

More Information: *The Search Conference*, Merrelyn Emery and Ronald E. Purser

7. Cross Impact Analysis

Description: A method for revealing and exploring the first and second order implications and impacts of a set of hypothesized events. The essential question is, "Assuming that X (an event or result) has happened, what else will happen because of X having happened?" Best undertaken in groups or asynchronous dialogues. It can be done simply or with great sophistication.

Results: An increase in the capacity to see beyond the obvious implications of change and do so more systematically.

Participants: From 1 to 8 in face-to-face groups. Up to 40 in asynchronous dialogues.

Degree of Difficulty: Easy to moderate.

More Information: Millennium Project's *Futures Research Methodology* CD v 2.0

8. Delphi Studies

Description: A way of allowing experts to refine their judgment about the future, including new developments and their implications. The dynamic is essentially an asynchronous dialogue – tell me what you think about X; now I'll tell you what other experts think about X; do you want to change your views about X, and repeat.

Results: Done well, a Delphi study can reveal new insights. Done badly, it pools ignorance.

Participants: Normally, 8 to 40 participants. Delphis of several hundred have been undertaken successfully.

Degree of Difficulty: Hard. A good deal of knowledge and sophistication is required to undertake a sound and useful Delphi.

More Information: Millennium Project's *Futures Research Methodology* CD v 2.0

9. Depth Analysis

Description: Also known as causal layered analysis. A way to get under surface phenomena to the underlying cognitive and cultural foundations and structures. Einstein's quote that "We cannot deal with problems at the same level at which they were created," reflects an appreciation of the depths of human consciousness and culture. The five Elements of the SAL project are based on such an analysis. The general assumption is that the deeper levels are the source and cause of the more superficial levels. The implication is that if significant changes of behaviour are desired, then appropriate changes in the foundations of such behaviour are also required.

Results: A deeper understanding of the depth and complexity of the situation one is facing and coping with.

Participants: From 4 to 40 in small groups.

Degree of Difficulty: Hard. This is new and unfamiliar work for almost everyone in our culture.

More Information: Foresight Canada.

10. Focal Questions

Description: A set of questions and inquiries that assists a group to dig under presenting issues to the issues that underlie the situation with which it is wrestling.

Results: A firmer grasp on the underlying issues which a group should be addressing.

Participants: In small groups of 4-8, from 4 to 100 in total.

Degree of Difficulty: Moderate for the designer and facilitator. Easy to moderate for participants.

More Information: Foresight Canada

11. Futures Wheel

Description: Another method that enables participants to surface and explore the first and second order implications of a given action. A given event is hypothesized as having happened. It is at the centre of the wheel. Then the question becomes, as it does with Cross Impact Analysis, "If this event has happened, what else has happened?" The implications of each of these consequences are then explored.

Results: A clearer understanding of the consequences of particular possible actions.

Participants: Done best in groups, but can be done as an asynchronous dialogue.

Degree of Difficulty: Medium.

More Information: Millennium Project's *Futures Research Methodology* CD v2.0

12. Genius Interviewing

Description: A way of stretching one's mind and imagination by picking the brains of an exceptionally gifted and knowledgeable person.

Results: Fresh insights. A reasonably coherent view of the situation one is facing, against which one can test one's own views.

Participants: One or two persons conducting the interview. If fish-bowled, several hundred may be observers and learners.

Degree of Difficulty: Hard. The interviewer needs a good deal of knowledge and experience.

More Information: Millennium Project's *Futures Research Methodology* CD v2.0

13. Guided Imagery

Description: A way of accessing the human unconscious by evoking and then exploring the images that emerges under the guidance of a skilled practitioner. An issue or question is chosen, e.g. your sense of the future of the environment or your role in your community.

Results: New insights into the matter at hand; insights that are seldom accessible by conscious effort.

Participants: This process is designed for small numbers of people – the practitioner and at least one subject. Skilled practitioners can handle groups of up to 20.

Degree of Difficulty: Hard. Few practitioners have these skills.

More Information: Colleagues of Foresight Canada, through FC.

14. History and Heritage

Description: This process is taken from Phase Two of a Search Conference: System Analysis. It invites participants to reflect on the milestones and key events that created the system they are in. It drives home the idea that just as we worked together to create the system we have, we can work together to create a desired future. Participants reflect on such questions as, "What is unique about our culture?" "What historical events have shaped our identity?" and "What aspects of our character do we need to preserve and value as we plan for the future?"

Results/Why Use It: "There can be no viable future that does not have its roots somewhere in the past. New futures will not spring into being without sharing some of the continuities that people value in their lives and their previous work." (Emery, Purser, Pg. 41) This process is key to creating the trust, openness, creative working mode, and positive energy that are the desired characteristics of a successful Search Conference.

Number of Participants Required: 35

Degree of Difficulty: Medium

More Information: *The Search Conference*, Merrelyn Emery and Ronald E. Purser

15. Interactive Planning

Description: This method is used to create a desirable future by identifying the current state (system of problems or a mess) and an ideal future state in ways that illuminate the resulting gap. The idea is to 'dissolve' problems by changing the way the system interacts with its environment. The process requires two groups – one that focuses on creating a clear formulation of the 'mess' and another that works independently to create an ideal future. The process requires that the *mess* team have representation from as many perspectives as possible and from as many levels as possible so that all the problems can be identified and linked. The *ideal future* team requires individuals who can truly think into the future and 'design' emergent situations, issues and ideas. This is in contract to the oft-used practice of focusing on and solving the familiar problems before us.

Results: Results include a rich description of the gap between *idealized future* and *mess*, and often results in initiatives that will help close the gap.

Participants: Typical *mess* groups involve anywhere from 15 to 60 participants, as long as a process is designed that will help bring together all the ideas and perspectives from various sub-groups. The *ideal future* team requires future thinking individuals and is usually smaller – up to 10-12 participants. All participants bring their own perspectives and experience to the activity. Diversity of experience and perspectives is required, especially for the *mess* group.

Difficulty: Medium to high. The *mess* team requires time to gather information from each perspective and then a series of meetings to create a pictorial representation of the *mess* together with a report that identifies the main factors and 'critical trends'. The *ideal future* group requires the right 'design' activities that help it break from the usual. Time requirements for sessions are moderate and spread out. Process is simple, but must be facilitated.

More Information: Ackoff, Russel L. *Re-Creating the Corporation*. (1999). Oxford University Press: New York.

16. Literature Reviews

Description: A way of determining the mainstream and outlier views that exist among those who have published in a given field or regarding a given issue. A reasonably skilled person is given the time to read widely regarding the field or issue with a view to determining the main contours of the field, including the broad areas of agreement and disagreement.

Results: A paper that allows lay persons to get a feel for the field or issue in a relatively rapid and painless way.

Participants: The primary participant is the literature reviewer. The number of persons who could read the review is in principle very large.

Degree of Difficulty: Hard. This is highly skilled work.

More Information: Any experienced researcher in the humanities or social sciences.

17. Media Coverage

Description: A way of establishing the fact of a project with the public or of bringing them up to date on its progress. It can take many forms – op ed pieces, media interviews, talk show appearances.

Results: The public profile of a project or issue is raised among those who attend to the media utilized.

Participants: A willing media person and a skilled representative of the issue or project.

Degree of Difficulty: Medium to hard.

More Information: Any experienced communications specialist.

18. Mess Maps

Description: A way of presenting complex information and allowing large numbers of people to make sense of it. Essentially, the elements and relationships of a complex situation are identified and presented in graphic form on a large sheet of paper – 6' x 10' or even 20'. This allows small groups of people to "wander the wall" together, discussing what they see with a view to identifying areas of agreement and items that need to be corrected or added. When compared to the kind of discussion that is based on a ½" thick printed report, mess maps are far more accessible. Participants actually explore the elements, structure and relationships that comprise the mess, rather than plumping for their favorite solution to the mess. Have been used by NASA and the British Cabinet Office.

Results: Participants understand the elements and complexity of the situation they are wrestling with.

Participants: A small team to create the mess map, thereafter any number may use it in groups of 20-30.

Degree of Difficulty: Easy to use, once created. Hard to create.

More Information: Robert Horn is accessible through Foresight Canada. See examples of mess maps at: http://www.stanford.edu/~rhorn/

19. On-Going Table Groups

Description: A group of persons – 8 to 14 – who commit to meeting together as a group for the purposes of a given project. Members may be strangers, drawn from several sectors of society or they may be members of an existing affinity group, e.g. a church, service club, professional association, voluntary organization, etc. Typically, the group would meet every 2 to 4 weeks for 2-3 hours over an extended period of time – 6 to 18 months. Such groups become the backbone of the cognitive work of the project. The project website is used to capture group discussion and share it with others. Occasional regional or province-wide meetings allow members of the different groups to meet one another and share experiences as well as learn together. On-going Table Groups ensure that a project has a sound cognitive base. Yet the basic experience of each participant is as a member of a small face-to-face group. Finally, this pattern allows those who join a project late to do all of the necessary work, as long as they agree to meet more often until they are caught up.

Results: Participant satisfaction increases because they have a "home room." The cognitive quality of the project increases, because large numbers of people are working along with the project staff. Both

these results are required if a community of interest is to be created that both understands the situation and is committed to actually dealing with it.

Participants: Any number of Table Groups can be formed.

Degree of Difficulty: Moderate to hard. Table Groups are demanding on the project staff, but good staff work results in people participating with enthusiasm and satisfaction.

More Information: Foresight Canada.

20. Reliable Forecasts of the Future

Description: Reliable forecasts of the future are those that are as grounded as possible in current data and trends. They are useful to assist participants to understand the implications of present trends, if extended over a given period of time. Consider in this light the work of both David Schlinder and Brad Stelfox. Of course, forecasts should not be taken as predictions.

Results: A sound understanding of what the future will become, given certain assumptions.

Participants: A small team to create the forecast; then any number can benefit from it.

Degree of Difficulty: Hard.

More Information: Any established forecaster.

21. Remarkable Persons

Description: A "remarkable person" is exceptionally knowledgeable and wise regarding human affairs. Such persons offer perspectives that inevitably provoke minds and stretch imaginations. Encounters with such living persons result in memorable and even life-changing experiences.

Results: Participants grow in their appreciation of the subtle and complex character of the issues at hand. Also, they are often inspired to deepen their commitment to make a difference.

Participants: Can be several hundred, if the setting is right.

Degree of Difficulty: Moderate. The skill is in choosing an appropriate person and designing an effective way for him/her to engage the participants.

More Information: Foresight Canada

22. Scenario Creation

Description: Scenarios are alternative descriptions of possible futures that could reasonably develop from the present. They are stories describing how a range of different futures could unfold. They focus on the forces driving change and the critical uncertainties leading to distinctly different futures.

The process of developing scenarios is typically a series of facilitated and structured workshops emphasizing participant interaction and dialogue. Workshops develop ideas which are used as a basis for

developing written stories. Participants bring their own experience to the project; specialized knowledge is valuable but not essential. Diversity of experience and perspectives is valuable.

Participants: Typically, a scenario creation working group involves 20 – 25 participants. Up to 40 participants can be accommodated if enough time is available.

Results: Scenario creation broadens perspectives, challenges assumptions, encourages critical thinking, surfaces insights and fosters shared understanding. The scenarios identify key driving forces and critical uncertainties, raise strategic issues, provide context for developing a vision including key variables to be included in the vision, and offer a vehicle for communication and dialogue with a wide variety and number of interested groups.

Difficulty: Medium to high. Time requirements for workshops are high (minimum of 2 workshops, 1 ½ days each) and the process can be complicated. FC has extensive experience with this methodology.

More Information:

Peter Schwartz, *The Art of the Long View*
Kees van der Heijden, *Scenarios: The Art of Strategic Conversation*
James A. Ogilvy, *Creating Better Futures: Scenario Planning as a Tool for a Better Tomorrow*; and
www.gbn.org

23. Simulation Games

Description: A simulation enables participants to get a feel for what life is like given a different set of assumptions from the ones they normally make. Participants are put into defined situations, and asked to play defined roles based on explicitly stated assumptions. This experience of acting on the basis of assumptions other than those, to which one has been socialized, creates cognitive dissonance. In turn, the dissonance is the source of insight into the situation at hand – a prerequisite for the development of strategies that will actually be effective.

Results: Insights into the underlying patterns of consciousness and cultures, both one's own and those of others. These are required if the objectives and strategies that emerge from a project are to be relevant, as well as effective.

Participants: Depending on the complexity of the simulation, 12 to 60.

Degree of Difficulty: Hard.

More Information: Millennium Project's *Futures Research Methodology* CD v 2.0

24. Soft Systems Methodology

Description: This method is best employed as a means of organizing people's thoughts about a problem situation rather than a way of describing a portion of reality. The basic premise is that problems arise when people have contrasting views of the same situation. Therefore, the focus is on the artifacts and dynamics of culture and the means of enquiry into these cultural elements. The process requires a series of meetings that periodically shift from the *thought* world of assumptions, concepts, etc. to the *real* world of actions, policies, etc. The process is multi-staged and requires a dedicated group of people who have a real stake in the outcome. Each stage is different and has different activities. The work is largely

conceptual, but requires a real grounding in the problem or issue. The results can be varied. The full process can lead to specific actions with accountabilities.

Results: The process ends once a common picture of the world is created or when a set of common themes is identified.

Participants: All participants bring their own perspectives and experience to the activity. The commitment to share and to remove political power from the process is important although it can be mapped and incorporated. To go the full route, those participants who begin the process should be also the ones who can be deliberate and committed actors in making any changes that are identified. Diversity of experience and perspectives is required.
Difficulty: Medium to high. There is a need to commit to both a multi-stage process, and to commit to taking action when the process is completed. Time requirements for sessions are moderate and spread out. The process is complex overall, but each step is relatively simple and focused. The dialogue and the overall process must be facilitated.

More Information:

Checkland, P. *Systems Thinking, Systems Practice*. (1989). John Wiley & Sons: New York.
Checkland, P. *Systems Thinking, Systems Practice: includes a 30-year retrospective*. (1999). John Wiley & Sons: New York.

25. Story Board

Description: A story board is a large and long sheet of paper that tells the story of the evolution of some issue in a multi-leveled way, e.g. the relationship of humans to the natural world over the last 300 years in Alberta, showing what is happening at each major period with such variables as technology, housing, transportation, spirituality, cultural narrative, economy, population, a day's travel. A story board shows the systemic interplays among the various dimensions of a culture over time in a way that is available to large numbers of people; something the printed text cannot do. Since we act on the basis of our understanding, it is no small thing to make it easier for folks to come to new understandings of fundamental aspects of life.

Results: The majority of ordinary people can come to grasp the evolution of a total situation – what is changing, when and why – and not just respond to specific changes as one-off events.

Participants: A small team to create the story board, which once created, can be used by many thousands to make new sense of their situation.

Degree of Difficulty: Hard.

More Information: Any director of a significant museum.

26. Strategic Assumption Surfacing and Testing

Description: This method is used to identify, draw out, test and discuss the assumptions that underlie a given issue, position or perspective. The process is used to help a group of individuals with diverse positions and perspectives surface the bases of their positions for elaboration, challenge and discussion. The process begins with each perspective offering his her story or point of view and moves quickly to the articulation of the basic assumptions each holds. The assumptions are then mapped together and challenged one by one until the main agreements and differences are identified.

Results: The product is a small set of assumptions that may form the basis for a common solution or perspective that is more inclusive than any one perspective. This set of assumptions may also display those points where groups fundamentally differ.

Participants: Typical working groups involve 8-12 participants. Participants bring their own perspectives and experience to the activity and must be willing to defend AND delve into their basic assumptions. They must also be willing to be challenged. Diversity of experience and perspectives is required.

Difficulty: Medium to high. Surfacing and challenging one's deep assumptions is not a normal activity in our society. The challenge phase can be heated, so a strong facilitator is required. Time requirements for sessions are moderate, but can be of high intensity. The process is simple, but dialogue must be facilitated.

More Information: Flood, Robert L. and Romm, Norma R.A. (Ed.) *Critical Systems Thinking: Current Research and Practice*. (1997). Plenum Press: New York.

27. Systems Descriptions

Description: Systems Dynamics is often used as the basis for computer modeling because it provides a way to understand entities and their relationships as they occur in large complex systems. The 'softer' version (Systems Descriptions) is less rigorous in detail but richer in terms of helping a broader range of individuals understand the complexity of a single issue. The process is used to help a group of individuals with diverse perspectives create a common story or narrative of any situation, problem or challenge in a way that identifies possible leverage points. The process begins with each perspective offering his/her story or point of view. As each new perspective is added, all the stories are represented but in a larger, more comprehensive diagram that surfaces insights and fosters shared understanding.

Results: The product (the systems description) identifies the main players in an issue, how they interact, and possible points of leverage. There can be several different forms of systems descriptions.

Participants: Typical working groups involve 5-6 participants, but up to 40 participants can be accommodated with the right equipment, materials and knowledge of how the issue, situation, or problem is broken down/partitioned. Participants bring their own perspectives to the activity; specialized knowledge is valuable but not essential. Diversity of experience and perspectives is required.

Difficulty: Medium to high. Time requirements for workshops are high (minimum of 2 one day workshops). Process is time-consuming as there is much discussion. FC has extensive experience with this methodology.

More Information:

Gharajedaghi, Jamshid. *Systems Thinking: Managing Chaos and Complexity*. (1999). Butterworth-Heinemann: Massachusetts.

Van Gigch, John P. *System Design Modelling and Meta-modelling*. (1991). Plenum Press: New York.

28. Workbooks

Description: A 12-20 page paper or electronic book that both explains and lays out a situation to those who use it and invites them to make critical strategic decisions and forced-choice trade-offs regarding the path forward for the issue in question. Workbooks can be completed by individuals or small groups. What emerges from the use of workbooks are participants who are more knowledgeable and sensitive to the fact that we cannot have it all; that choices must be made. Their responses tend to be more nuanced than responses determined by polling. If the book is designed for it, the basis for the judgements can also be revealed.

Results: Better-educated and more sensitive and sympathetic participants. Increased reliability of the aggregated judgement of all participants.

Participants: The only limits are those of the resources of the project team to interpret such information.

Degree of Difficulty: Hard. It takes skill to develop an effective workbook.

More Information: Foresight Canada, View Point Learning. http: www.viewpointlearning.com/

METHODS FOR SAL STRATEGY ELEMENT II – OUR VISION

3. Access to Information and Resources by a SAL Website

See Element I above

29. Candidate Ideas

Description: A candidate idea is an idea offered by a participant or group as a candidate to be considered as the option of choice for a particular idea that is required. For example, in Element II candidate ideas might be the topics that should be included in a vision statement. Criteria are established for the candidate ideas and then participants are invited to conceive and articulate several ideas that meet the criteria. Those ideas that meet the criteria will be accepted as candidate ideas. A further process is then required to work with and choose among the various candidate ideas. This is a method for developing a host of possibilities, while keeping a focus on the work at hand.

Results: A plenitude of ideas that answer the question asked.

Participants: Typically, this is small group work. Any number of groups can participate.

Degree of Difficulty: Easy to Moderate. Clarity is the key.

More Information: Foresight Canada

4. Community and World Cafés

See Element I above

30. Conceptual Clarification

Description: The clarification of the meaning of the key words and ideas which are inherent in a project. If these meanings are not clear and defined, then it will be impossible to determine if progress has been made. The work often includes use of Venn diagrams and transformational grammar to determine how somewhat similar concepts relate to each other.

Results: Clear and shared understandings of the key concepts and words inherent in the project.

Participants: 6-60. Typically this is facilitated group work.

Degree of Difficulty: Hard. The facilitator holds the key.

More Information: Foresight Canada.

9. Depth Analysis

See Element I above

11. Futures Wheel

See Element I above

13. Guided Imagery

See Element I above

31. Imaging

Description: This process was developed for workshops to imagine, think through, and design actions leading to a world free from war and major conflicts. It is designed to focus on a more distant future, 25 to 50 years out. It invites participants, working in groups of three, to 1) develop some personal goal statements, 2) build on personal memories by remembering the good in our lives, 3) step into a desired future and remember back from that future, i.e., we are in 2030 and what is it like to be there, 4) share with the larger group for clarification and understanding, 5) map consequences and outline key structures and institutions, 6) create a history of desired future explaining how we got there, and, 7) list concrete and specific goals for self, family and community.

Results/Why Use It: This process invites people to bring personal experience and perspectives to the visioning task. It should be an inviting, imaginative and creative experience.

Number of Participants Required: 30

Degree of Difficulty: Medium

More Information: *Building a Global Civic Culture*, Elise Boulding, Appendix 2

32. Letter Writing to the Future

Description: Participants are invited, alone or in groups, to write a letter to the future. The type of letter – hard-headed, heart-felt, etc. – the topic and the time frame are all specified. The letters are then shared, e.g. posted on the website, and analyzed for themes and content. The assumption is that such letters can reveal deeper feelings and commitments than normal responses to questions. This exercise can be undertaken by any age group willing to participate.

Results: Fresh insights into the authentic feelings and thinking of those who participate.

Participants: Alone or in groups; any number can play.

Degree of Difficulty: Easy. Clarity of the instructions is the key to success. The analysis may take time, but it is not inherently difficult.

More Information: Any graduate department in the humanities or any sophisticated correspondence unit.

19. On-Going Table Groups

See Element I above

33. Re-Framing

Description: A method that invites participants to consciously consider a question or situation from a point of view that is not normally their own. "How would this feel and look to you if you were...?" is a typical question. But of course, there are others. The blank might include such options as "a First Nations person prior to contact?" or "a third generation rancher?" or "an elected Councillor of a county?" The options are virtually endless. The meta-point is that we live in a world of multiple perspectives that cannot be reduced to a single "right" view. The immediate learning is sensitivity to viewpoints not yet one's own.
Results: Participants who are themselves more open and responsive to perspectives other than those which they have inherited.

Participants: 6 - 100. Typically, in small groups.

Degree of Difficulty: Easy. A skilled facilitator is required.

More Information: Foresight Canada. Also http://www.users.globalnet.co.uk/~rxv/demcha/reframe.htm

34. Right-Brained Work

Description: The right side of the brain is the side stimulated by artistic and integrative experiences – music, art, dance, sunsets, etc. Most formal work in our society values the left side of our brain – logical, actual, analytical. Yet, scientists talk of the *beauty* of a good hypothesis. It is not just metaphor. Good policy work needs to include right-brain work – collage-making, dance, imagery, intuition.

Results: More integrated outcomes. Fewer "oops" from having overlooked critical right-brained factors.

Participants: Any who are in the project. Permission should always be given to those who wish to sit out these methods.

Degree of Difficulty: Hard. It takes a skilled facilitator.

More Information: Foresight Canada.

25. Story Board

See Element I above

35. Wind Tunnelling

Description: Wind tunnelling is a step in a complete scenario creation process. It can also be used on its own. It is a way to test existing or proposed strategies, programs or structures. The item in question is dropped into one of the possible future worlds that participants have agreed could emerge. The question is, "How well would it do in such a world?" "Would it flourish or fail?"

Results: Existing and potential strategies, etc. can be tested without harm to real world people or institutions.

Participants: 6 to 60. Typically, this is small group work.

Degree of Difficulty: Medium. A skilled facilitator is required.

More Information: Foresight Canada

28. Workbooks

See Element I above

METHODS FOR SAL STRATEGY ELEMENT III – OUR STRATEGIC INTENTIONS

3. Access to Information and Resources by a SAL Website

See Element I above

36. Brainstorming

Description: A formal way to generate a large number of options in a short period of time. Participants are invited to note and share the solutions to an issue that come to their minds, without censoring those items that emerge. The rule is that no answer is a bad answer in a brainstorming exercise. Evaluating the possible responses is work that falls outside of a brainstorming exercise.

Results: A large number of possible responses to a question or issue.

Participants: 6-100.

Degree of Difficulty: Easy. A skilled facilitator helps.

More Information: See http://www.jpb.com/creative/brainstorming.php

7. Cross Impact Analysis

See Element I above

4. Community and World Cafes

See Element I above

9. Depth Analysis

See Element I above

37. Design Studio

Description: A design studio is an intentional exploration of a significant issue or challenge using the principles of design. The approach is not that of problem-solving, but issue-dissolving by responses that are elegant and contextually appropriate. The design charrettes used by architects are one version of a design studio exercise.

Results: Unanticipated and elegant solutions to swampy issues.

Participants: 12-40

Degree of Difficulty: Medium to hard.

More Information: See http://www.dca.state.ga.us/toolkit/ToolDetail.asp?GetTool=13

11. Futures Wheel

See Element I above

13. Guided Imagery

See Element I above

33. Letter Writing to the Future

See Element II above

19. On-Going Table Groups

See Element I above

35. Right-Brained Work

See Element II above

38. Scenario Writing

Description: Scenario writing is a phase of normal scenario creation. However, it is also useful as an exercise that is exploring possible alternatives. For example, "Write a scenario starting from today's realities by which the society-shaping goal you have proposed can be achieved in the time frame you assigned to it. Factor in the obstacles you had to overcome and how you did it, and the turning points. "This work teaches participants to think in an inclusive manner over longer periods of time. It can also be used to test the validity of proposed major goals.

Results: Better formulated goals.

Participants: 6 to 60, in small working groups.

Degree of Difficulty: Moderate, with the support of a skilled facilitator.

More Information: See http://www.pirp.harvard.edu/courses/ge15620032004_2003ScenarioInstructions.doc

25. Story Board

See Element I above

35. Wind Tunnelling

See Element II above

28. Workbooks

See Element I above

METHODS FOR SAL STRATEGY ELEMENT IV – OUR STRATEGIC GOALS

3. Access to Information and Resources by a SAL Website

See Element I above

36. Brainstorming

See Element III above

29. Candidate Ideas

See Element II above

9. Cross Impact Analysis

See Element I above

4. Community and World Cafes

See Element I above

37. Design Studio

See Element III above

11. Futures Wheel

See Element I above

13. Guided Imagery

See Element I above

19. On-Going Table Groups

See Element I above

38. Scenario Writing

See Element III above

39. Viable Systems Diagnosis

Description: This method focuses on how an entity or group of entities is organized. In its original form, it is used to diagnose defects or pathologies in organizations. In its looser form the process is used to identify levels within any organizational structure and the control structures that act on these levels individually and collectively. The process begins with a view of the levels within an organization (formal or informal). Five separate 'systems' are identified; their control structures articulated and linked. Each system is understood as a distinct structure.

Results: The product is a picture of an organization that clarifies how it is controlled, using five basic systems levels.

Participants: Typical working groups involve 6-12 participants. Participants bring their own perspectives and experience of an organization. No specialized knowledge is needed other than experience with one of the five systems. All five systems need to be represented.

Difficulty: Medium. Each systems level must be included by people who are willing to represent and discuss the control structures and processes involved – both formal and informal. Process is complex, but logical. It requires an experienced facilitator.

More Information: Beer, Stafford *Diagnosing the System for Organizations*. (1985). John Wiley & Sons: New York.

40. Vision Gap Analysis

Description: Vision gap analysis is a structured approach to identifying and bridging difficult gaps by encouraging "breakthrough" thinking. It involves six steps: (1) developing a future vision (desired future end state) on a subject of interest; (2) describing the current situation; (3) identifying the gaps between the vision and the current situation (the What); (4) prioritizing the gaps; (5) developing SMART objectives (Specific, Measurable, Actionable, Realistic, Timely) that need to be accomplished to bridge the gap (the How); and (6) developing creative strategies to achieve the objectives. Note that what are called 'objectives' in this method can be what SAL calls society-shaping goals.

Results: A clear line of sight from one's vision to one's strategies and their operational implementation.

Participants: Can be used with large numbers (e.g., 50+) focusing on different elements of the vision.

Difficulty: Medium to Difficult. Basic logic is straightforward, but the actual process is relatively complicated due to the fact that unstated differences will surface. Expert knowledge and sound facilitation are an advantage at the objectives and strategy stages.

More Information: Paul Clark, "Vision Gap Analysis," a paper.

35. Wind Tunnelling

See Element II above

28. Workbooks

See Element I above

METHODS FOR SAL STRATEGY ELEMENT V – OUR MANAGEMENT STRATEGIES

3. Access to Information and Resources by a SAL Website

See Element I above

36. Brainstorming

See Element III above

29. Candidate Ideas

See Element II above

9. Cross Impact Analysis

See Element I above

38. Design Studio

See Element III above

11. Futures Wheel

See Element I above

19. On-Going Table Groups

See Element I above

36. Wind Tunnelling

See Element III above

28. Work Books

See Element I above

ADDITIONAL INFORMATION

For more information about any of these methods, please contact Foresight Canada:

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